

Notes from the Quarterly Workforce Planning Professionals Meeting — January 28, 2015

Recruitment

Data for Recruitment Efforts

CalHR will be inviting departments to participate in a Recruitment Survey to gain an understanding of state civil service recruitment needs. Information regarding the survey is forthcoming.

Making the Hiring Process Faster

CalHR's new Examination Certification Online System (ECOS) is designed to improve and simplify the state's hiring process. ECOS will be released in phases throughout 2015 and 2016. The My Cal Career portion of ECOS will be released this spring. My Cal Career will allow job seekers to establish an online profile, search for exams and vacancies, track their exam scores, and submit online applications.

Before the My Cal Career profile is released, the Jobs.ca.gov website will feature a layman's term search to make it easier for job seekers who are not familiar with the state's classification titles to search for exams and vacancies. The layman's term search will be released in the coming weeks.

Recruiting for Specific Positions

To post a difficult to recruit or high volume classification to the [Hot List](#) on CalHR's Statewide Recruitment webpage, contact Brandon Littlejohn at brandon.littlejohn@calhr.ca.gov.

Also available on CalHR's Statewide Recruitment webpage is a list of [upcoming career fairs](#). CalHR is willing to represent and/or partner with your department at career fairs, and will bring your materials with us if you are unable to go to the event.

CalHR is developing partnerships with colleges and universities to recruit students who have specific knowledge and skills needed for hard-to-recruit classifications. Contact Brandon Littlejohn at brandon.littlejohn@calhr.ca.gov for more information.

Statewide Recruitment Webpage

The Statewide Recruitment webpage is now easier to access from CalHR's homepage. To access the webpage, go to www.calhr.ca.gov, click on State HR Professionals, then select Workforce Planning and Recruitment at the end of the list, and click on Statewide Recruitment. Some information on the Statewide Recruitment webpage can also be found on the www.jobs.ca.gov to make it easier for job seekers to access.

Succession Planning

Succession Planning and the Merit System

Succession Planning is an equitable system offering all employees professional development opportunities that prepare them for leadership roles. Regardless if succession planning initiatives are formal or informal, the department never guarantees a position to an employee. Participation in formal programs is voluntary, and priorities can be established based on readiness assessment results. The goal of succession planning is to provide tools and resources to employees to be successful at a certain level of leadership. Succession planning is a benefit to any employee who takes advantage of professional development opportunities.

One challenge for departments when they pursue succession planning is working an employee outside of their classification level. The following solutions/suggestions are provided:

- Manage cross-training pairs to ensure the trainee will not be performing duties beyond a 10 percent increase in level over the trainees classification.
- Utilize temporary Out-of-Class Assignment.
- Utilize Training and Development Assignments.
- Board of Equalization has a CAP Program which spans over one year and three 'tours of duty' of cross training opportunities allowing employees to be exposed to multiple program areas in the department, share knowledge, network, and increase interest and excitement about their career path at the department.
- Franchise Tax Board has a Management Rotation Program for managers to take on assignments in different programs areas to expand their knowledge and organizational awareness.
- CalPERS has an [Executive Succession Planning Program](#) involving a self-nominated development opportunity to prepare an employee to perform at the executive level. Additional CalPERS tools can be found on the [Workforce Planning Toolkit](#) webpage.

Succession Planning V. Upward Mobility

Upward Mobility is a program in which career opportunities are developed and published and assistance is provided which will allow employees in low-paying occupations to develop and advance to their highest potential.

Key distinctions between succession planning and Upward Mobility include:

- Succession planning is optional while Upward Mobility is required by 'all appointing authorities of state government,' as mandated in [Gov. Code, § 19400](#).
- Succession planning initiatives are open to all employees while Upward Mobility initiatives are targeted at employees in low-paying occupations.
- Succession planning metrics for success are defined by each department while Upward Mobility metrics are pre-identified by [State Personnel Board Governing Regulations](#).

Recruitment and Retention Program

Program Overview

CalHR's Statewide Workforce Planning and Recruitment Unit (SWPRU) has developed a New Employee Survey (NES) and an Employee Exit Survey (EES) as part of the new Recruitment and Retention Program (RRP). This effort is the state's first attempt to capture employee entrance and exit survey data at a statewide level. The purpose of the program is to provide data that departments can use to enhance recruitment and retention strategies. Participation in the surveys is voluntary and anonymous. Survey respondents will read a series of statements in each section and select Strongly Agree, Agree, Neutral, Disagree, Strongly Disagree, or Unknown for each statement.

SWPRU will collect all responses directly via SurveyMonkey and/or by hardcopy surveys, and report aggregate results to departments for on a semiannual basis. The Recruitment and Retention Program description and supporting tools will be delivered to departments via PML by March 31, 2015.

Employee Exit Survey Updates

SWPRU used feedback from department human resources chiefs, EEO Officers, and Workforce Planning Professionals to make the following changes to the Employee Exit Survey:

My Job. This section of the Employee Exit survey is about the person's perception of their job. The following survey statements were added, changed, or deleted based on stakeholders' feedback about the survey.

Original statement 1: I was challenged by my job. Updated statement: My work was sufficiently challenging.

Original statement 2: My workload was reasonable. Updated statement: I had sufficient time to complete my job assignments.

Statement 3 will be deleted from the survey as it is now being addressed through Statement 1.

Statements 7 – 10 will be deleted as they measure engagement which is already measured through multiple existing statements.

Original statement 11: My work was meaningful. Updated statement: My work was meaningful to me.

New statement: My duty statement accurately reflected my work assignments.

My Professional Development. This section of the Employee Exit survey is about the person's professional development including formal/informal training, coaching, mentoring, other professional development.

The survey statements were changed to say “professional development” instead of only “development” in order to clarify and reiterate ‘development’ as ‘professional development.’

Statement 17 was changed from “I received coaching and mentoring” to “I received effective coaching and mentoring”.

Work Environment. This section of the Employee Exit survey is about the person’s perception of their work environment. The following survey statements were added, changed, or deleted based on stakeholders’ feedback about the survey.

Statements 20 – 21 were changed from ‘my department’ to ‘my workplace’ to speak more directly to an employee’s immediate work environment.

Original statement 22: The department encouraged innovation. Updated statement: I was encouraged to innovate and try new things.

In Statements 24 – 25 ‘available’ was deleted to broaden the scope of both statements.

Statement 27 will be deleted from the survey as it is inapplicable.

Original statement 28: My coworkers were committed to doing quality work. Updated statement: My coworkers were committed to producing quality work.

Statement 29 was changed to capture an additional level of the degree to which an employee enjoyed their experience at a department, by inquiring if it was to a degree that they would recommend the department to others.

My Immediate Supervisor. This section of the Employee Exit survey is about the person’s perception of their immediate supervisor. The following survey statements were added, changed, or deleted based on stakeholders’ feedback about the survey.

Program area was deleted from statement 30 in recognition that not all program areas have vision/mission statements.

Original statement 32: Planned and organized effectively. Updated statement: Planned and managed work assignments effectively.

New statement: Allowed a sufficient amount of independence to manage my own work assignments.

Statements 37 and 38 were combined.

Original statement 40: Provided coaching and/or mentoring. Updated statement: Provided effective coaching and/or mentoring.

Statement 47 is being deleted as communication is being measured through multiple existing statements.

My Leadership Team. This section of the Employee Exit survey is about the person's perception of their leadership team, including senior management. No survey statements were added, changed, or deleted in this section.

Open Discussion

Ensure Workforce Planning Action Plans are Being Carried Out

During the implementation phase of workforce planning, ensure action plans are being carried out by the division/program area involved in the initiative by including them in the action plan development process to gain their buy-in. Additionally, having strong executive buy-in will gain increase support and accountability of the workforce planning goals and objectives.

'Overlap Hiring' Strategies

Although only one employee can occupy a position at any given time, there are several strategies that can be utilized to help minimize loss of knowledge or breaks in services when an employee is leaving:

- Utilize job shadowing, mentoring, coaching and cross-training while the exiting employee is transitioning out.
- Hire an employee through a blanket fund while the exiting employee is still occupying the position.
- Board of Equalization has Transition Binders which are developed by the exiting employee to capture critical knowledge for the employee succeeding them.

Use of CalHR Workforce Planning Tools and Resources

SWPRU provides a variety of tools and resources through the [Workforce Planning Toolkit](#) page. According to the 2014 Statewide Workforce Planning Evaluation the three most utilized tools and/or resources were: WFP Quarterly Meetings, State Employee Demographics and Labor Statistics, and Training Sessions/Materials. Some departments that have used SWPRU's tools:

- Board of Equalization who utilized a number of SWPRU's tools and resources to develop their department's Workforce Plan.
- Department of Education's workforce planning team has shared links to tools and resources on their intranet for managers/supervisors.

Documenting Interns and Volunteers

Utilizing interns and volunteers is an excellent strategy for developing the new workforce. Properly documenting your interns and volunteers is important. Suggestions and recommendations include:

- Use the same documentation used for contractors.
- Include all critical documents such as the State Application, emergency contact form, sexual harassment form, confidentiality contract, proof of training requirements met and other contracts or important policy information.

- Collaborate with your department's Legal, HR and Labor division to clear each intern.
- Keep all files under one division/program area, and ensure appropriate personnel have access to the files in case of emergency.
- Many departments have interns/volunteers' documents stored by HR in an area separate from employees' official personnel files.

Workforce Planning Forum

To gain access to the Workforce Planning Forum please email wfp@calhr.ca.gov.

A NEW forum is currently in development that will be open to State of California workforce planners, recruiters and trainers and serve as a platform through which these communities can collaborate, share, and communicate in addition to face-to-face meetings.

Other Resources

State Recruiters' Round Table (SRRT)

Recap of January 21, 2015 meeting: Shannon Leonardini of Apollo Education Group (parent company of the University of Phoenix and other universities nationwide) invited state recruiters to sign up for their free online Recruiters Dashboard to advertise jobs to their students and alumni. To see the full meeting minutes, including valuable tools and resources shared by departments, please visit the [State Recruiters' Roundtable website](#).

California Network of Learning Professionals (CNLP)

The CNLP is a supportive alliance of learning professionals collaboratively networking to provide the California state workforce effective and timely learning solutions. To subscribe to CNLP forum news or to get involved, visit the [CNLP website](#).